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ABSTRACT

This collection of library guides is designed to introduce undergraduate students at Chicago State University to basic business reference sources. Annotated bibliographies cover the subject areas of business management, marketing, and finance. Guides in the collection include: (1) Researching the Company (Chicago and Illinois business and national and international business); (2) Surveying Your Market (industry analysis, consumer analysis, and national business environment); (3) Industry Information (trade associations, census materials, indexes, and other reference sources); (4) Investments: Information Sources (current investment news, stocks, bonds, mutual funds and investment companies, dividends, industry information, and company information); and (5) Special Issues of Business Journals, (notes the nature of the special issues and the months in which they are published). Students are directed to newspapers, pamphlets, indexes, abstracts, census materials, periodicals, and other sources. Library of Congress catalog numbers and library locations are provided. A chart showing Dialog Information Services' coverage of the major business databases is included. (Author/THC)

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LIBRARY GUIDES TO BUSINESS INFORMATION

Abstract

This collection of five library guides was designed to introduce basic business reference sources to undergraduate students at Chicago State University. The annotated bibliographies are in the areas of business management, marketing, and finance. Students are directed to newspapers, pamphlets, indexes, abstracts, census materials, periodicals, and other sources. Library of Congress catalog numbers and library locations are provided. A selective list of special issues of business journals gives months that statistical compilations are published. Coverage of the major business databases are included. Titles in this collection are Researching the Company, Surveying Your Market, Industry Information, Investments: Information Sources, and Special Issues of Business Journals.

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Jamie L. Harris

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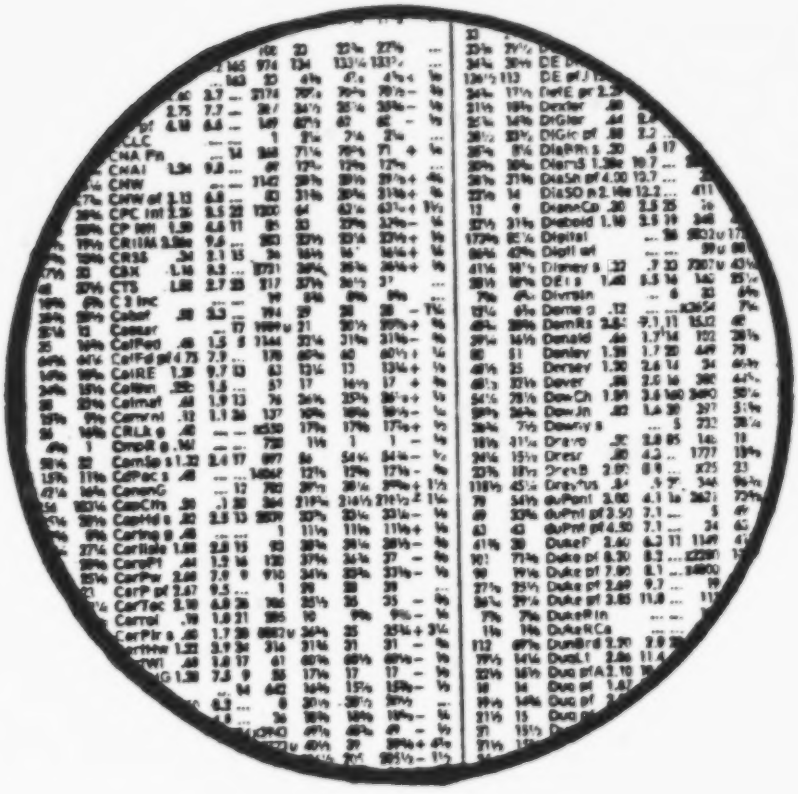
RESEARCHING THE COMPANY

A GUIDE TO LIBRARY SOURCES



Reference Department
DOUGLAS LIBRARY
CHICAGO STATE UNIVERSITY

BEST COPY AVAILABLE

CHICAGO AND ILLINOIS BUSINESS

Ref
HC
107
.I3I62

ILLINOIS SERVICES DIRECTORY. Chicago: Manufacturers News, Inc.
Data on non-manufacturing industries: contractors, wholesalers, etc. Gives employee count, SIC number and chief officers. Classified, alphabetical, SIC and zip code sections.

Ref
HD
9727
.I3H37

HARRIS ILLINOIS INDUSTRIAL DIRECTORY. Annual
Alphabetical, zip code, geographical and classified sections for industries in Illinois. Information on product manufactured, number of employees, financial rating, and subsidiaries.

Ref
HD
9728
.C4C43

METROPOLITAN CHICAGO MAJOR EMPLOYERS. Chicago: Chicago Association of Commerce and Industry.
Lists companies in 8-county Metropolitan Chicago area which employes 250 or more persons. Includes address, whether parent company, subsidiaries, number of employees parent company officers, line of business, sales and SIC number.

Ref
HD
2776
.I3A5

Illinois. Secretary of State. CERTIFIED LIST OF DOMESTIC AND FOREIGN CORPORATIONS. Springfield, IL. Annual.
Gives foreign and domestic corporations operating in Illinois which have filed with the Recorder of Deeds in compliance with the Business Corporation Act of Illinois.

Period-
icals

COMMERCE. Chicago Association of Commerce and Industry. Monthly.
Review of business in Chicago. Annual index.

Period-
icals

CRAIN'S CHICAGO BUSINESS
Weekly newspaper covering Chicago business. Special section each week on different segment of the business community. Major local business publication.

Index Table

CHICAGO TRIBUNE INDEX.
Index to articles in Chicago Tribune newspaper. Daily and Sunday issues located in Periodicals Room.

Ref
HG
4058
.C5B41

FIRST CHICAGO GUIDE. annual
Major publicly held corporations and financial institutions headquartered in northern Illinois. Formerly titled the BECKER GUIDE. Includes Chicago area's largest banks and thrift institutions. Gives directors and officers, summary balance sheets and income statements, etc.

NATIONAL AND INTERNATIONAL BUSINESS

Ref
HG
65
.G62

Goodman, Steven E. FINANCIAL MARKET PLACE: A DIRECTORY OF MAJOR CORPORATIONS, INSTITUTIONS, SERVICES AND PUBLICATIONS. NY: Bowker.
Gives names and addresses of the largest banks, investments firms, corporations, major CPA firms, law firms, credit card issuers, etc.

MOODY'S MANUALS. NY: Moody's Investors Service. Annual. Semi-weekly.

Ref
HG
4961
.M65

MOODY'S BANK AND FINANCIAL MANUAL.
Financial institutions, American and major foreign banks mutual funds, closed-end investment companies, brokerage houses, savings and loan associations, real estate investment trusts. Lists largest financial institutions by type.

Ref
HG
4961
.M67

MOODY'S INDUSTRIAL MANUAL.
Most industrial companies listed on the New York and American Stock Exchanges. Includes leading unlisted and regionally listed companies.

Ref
HG
4931
.M58

MOODY'S MUNICIPAL AND GOVERNMENT MANUAL.
Federal agencies, states, counties, cities, school districts, foreign governments and other issuers of government and municipal bonds. Includes tables and charts of bond yield averages, list of municipal industrial revenue bonds, tax status of bonds, etc.

Ref
HG 4961
.M7237

MOODY'S OTC INDUSTRIAL MANUAL.
Covers American and foreign industrial companies whose stock is traded over-the-counter.

Ref
HG4961
.M7245

MOODY'S PUBLIC UTILITY MANUAL.
Covers domestic and foreign public utilities.

Ref
HG4971
.M74

MOODY'S TRANSPORTATION MANUAL.
Includes air, rail, bus, trucking, and water transport industrial companies plus tunnel, bridge and oil pipelines.

Ref
HG4009
.M66

MOODY'S INTERNATIONAL MANUAL.

Ref
HG
4501
.M59

MOODY'S HANDBOOK OF WIDELY-HELD COMMON STOCKS. NY: Moody's Investors Service. Quarterly.
One page reports on most active stocks on the New York, American and over-the-counter stock exchanges.

Ready
Ref

VALUE LINE INVESTMENT SURVEY. NY: Arnold Bernhard. Weekly.
Covers about 1,500 companies in over 75 segments of industry and commerce. Thirteen weekly Editions four times a year. Statistics include estimated yield, dividends, and earnings.

Ref
HC
102
.D81

Dun and Bradstreet, Inc. MILLION DOLLAR DIRECTORY. Annual.
Lists U. S. companies with an indicated worth of one million dollars or over. Gives address, officers, products, sales, and number of employees. Georgraphic index and SIC index.

Ref
T12
.T612

THOMAS REGISTER OF AMERICAN MANUFACTURERS. NY: Thomas Pub. Co.
Lists manufacturers by product. Includes a brand name index and product index. Lists companies alphabetically with address, phone number and states where company is located. Some volumes are company catalogs.

Index
Table

BUSINESS PERIODICALS INDEX.
Index to articles in management, marketing, advertising, communications, economics, labor and taxation journals. An article about a company is indexed under the name of the company only if it is a large firm. If not, see the specific industry.

Index
Table

WALL STREET JOURNAL INDEX.
Divided into a corporate news section and a general news section. Look for companies in corporate news section. Current and back issues located in Periodicals Room.

Index
Table

PREDICASTS F & S INDEX OF CORPORATIONS AND INDUSTRIES.
Best periodical index to locate information about companies. Listed by company name, SIC, and product. Weekly with monthly, quarterly and annual cumulations.

Ref
HG
4057
.A4

POOR'S REGISTER OF CORPORATIONS, DIRECTORS AND EXECUTIVES.
NY: Standard and Poor's Corp. Annual
Directory of U. S. public and privately-owned corporations and their directors and officers. One volume gives short information on the corporation. One volume includes information on directors and executives. SIC and geographical indexes.

Ref
HF
3023
.AZW5

WHO'S WHO IN FINANCE AND INDUSTRY. Chicago: Marquis Who's Who. Annual
Information on awards and certificates received by the person, professional and association membership, writings and special achievements, home and office addresses.

Ref
HG
4057
.A219

DIRECTORY OF CORPORATE AFFILIATIONS: WHO OWNS WHOM. Skokie, IL: National Register. Annual.
Lists parent companies with divisions, subsidiaries, and foreign affiliates.

Verti-
cal
File

Corporate Annual Reports to Shareholders.
File of annual reports of the top 250 companies listed in the annual Fortune 500 list of the top U. S. industrial companies.

Verti-
cal
File

10K Reports. Disclosure Corp
Microfiche collection of reports which publicly held companies file with the U. S. Securities and Exchange Commission at the end of each fiscal year. Regional coverage.

Telephone Directories.
White pages and yellow pages of major U.S. cities. May be used to locate address and telephone number of a company to inquire directly, especially when you are unable to find the company in other sources.

COVERAGE OF MAJOR BUSINESS DATABASES

DIALOG INFORMATION SERVICES, INC	TYPE OF INFORMATION AND SOURCES	GEOGRAPHIC COVERAGE	TYPE OF COMPANY INFORMATION	TYPE OF INDUSTRY INFORMATION	SPECIAL FEATURES
ABI/INFORM	INFORMATIVE ABSTRACTS OF JOURNAL LITERATURE	INTERNATIONAL WITH EMPHASIS ON U.S.	COMPANY ANALYSIS CORPORATE STRATEGY ORGANIZATION HISTORY	TRENDS, FORECASTS ANALYSIS MANAGEMENT TECHNIQUES	MONTHLY SDI DOCUMENT RETRIEVAL
DISCLOSURE	EXTRACTS FROM SEC FILINGS	U.S. ONLY	DIRECTORY INFO FINANCIALS—3 YRS. BALANCE SHEET—2 YRS. SELECTED DATA—5 YRS. PERSONNEL/SUBSIDIARIES MANAGEMENT DISCUSSION		RETRIEVAL OF SEC FILINGS
DISCLOSURE/ SPECTRUM	SEC FILINGS	U.S. ONLY	STOCK OWNERSHIP —INSTITUTIONAL OWNERS —5% OWNERS —INSIDE OWNERS MARKET VALUE		
PTS F&S INDEXES	CITATIONS TO TRADE JOURNALS, NEWSPAPERS, REPORTS	INTERNATIONAL	NEWS ITEMS INC. MERGERS & ACQUISITIONS, NEW PRODUCTS NEW CAPACITIES	MARKET DATA NEW PRODUCTS PRICE CHANGES R & D GOVT. REGULATIONS	MONTHLY SDI DOCUMENT RETRIEVAL
PTS PROMT	INFORMATIVE ABSTRACTS OF JOURNALS, NEWSPAPERS, REPORTS	INTERNATIONAL	MARKET SHARE, SALES ORGANIZATION HISTORY NEW PRODUCTS MERGERS & ACQUISITIONS	PRODUCT DEVELOPMENT MARKET DATA GOVT. REGULATIONS PRICE CHANGES	MONTHLY OR WEEKLY SDI DOCUMENT RETRIEVAL
PTS ARA	ABSTRACTS OF ANNUAL REPORTS	U.S. AND SOME BRITISH, CANADIAN, JAPANESE	TOTAL SALES LINE OF BUSINESS DATA CORPORATE STRATEGIES PRODUCT INFORMATION	MARKET DATA NEW PRODUCTS	
PTS STATISTICAL FILES	PUBLISHED TIME SERIES & FORECASTS SELECTED FORECASTS FROM PREDICASTS	INTERNATIONAL		MARKET FORECASTS & TIME SERIES CAPACITY	DOCUMENT RETRIEVAL

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INDUSTRY ANALYSIS

1. SURVEY OF CURRENT BUSINESS (monthly)
U. S. Dept of Commerce publication. Important single source of business statistics for at least 12 major industries and some products. WEEKLY BUSINESS STATISTICS is the weekly supplement.

2. STANDARD & POOR'S INDUSTRY SURVEYS
Excellent source of industry information. Gives general background information, detailed composite statistics, and data on industry leaders. Covers limited number of industries.

3. U. S. INDUSTRIAL OUTLOOK
U. S. Government publication includes basic background information statistics and assessments of the prospects for U. S. industries. Does NOT give detailed statistics nor information on individual corporations in an industry.

4. PREDICASTS, PREDICASTS BASEBOOK
Gives current data and forecasts on industries. Information varies but often includes production and sales. Sources for data are given and can be used to locate additional information.

5. MARKETING ECONOMICS GUIDE (annual)
One of the best compilations of marketing research information available. Gives market dimensions for 1500 cities and most metropolitan areas.

6. U. S. CENSUS OF BUSINESS
Collected every 5 years (years ending in 2 and 7) Gives business data for U.S., individual states and SMSA's. Seven volumes include RETAIL TRADE, WHOLESALE TRADE, AREA STATISTICS, and SELECTED SERVICES.

7. CENSUS OF RETAIL TRADE
Statistics by state, SMSA, and other areas for about 100 kinds of retail businesses. Number of establishments, sales, payroll, and employment size.

8. SURVEY OF CURRENT BUSINESS (monthly)
U. S. Dept of Commerce publication. Current business figures. Lists commodity prices; finance; employment and wages; real estate and construction, etc. Also publishes special reports on income each year.

9. ALMANAC OF BUSINESS AND INDUSTRIAL FINANCIAL RATIOS (annual)
Large sampling of financial and operating ratios for wholesale, retail, manufacturing, bank and financial industries. Gives data on average assets and liabilities for each industry.

10. ENCYCLOPEDIA OF ASSOCIATIONS and NATIONAL TRADE AND PROFESSIONAL ASSOCIATIONS DIRECTORY (annual)
Directories that list organizations, officers, address, etc. Use to locate trade publication which often gives data on the industry. Sometimes only source of this information.

CONSUMER ANALYSIS

1. CHICAGO STATISTICAL ABSTRACT, 1980 - COMMUNITY AREAS
Data profiles of Chicago's 77 community areas taken from the 1980 U. S. Census of Population. Figures on age and racial groups, housing, income, occupation, and education are some of the statistics given for each community area.

2. SALES & MARKETING MANAGEMENT "Survey of Buying Power" (annual)
Primary source. July and October issues. July issue gives current estimates of population, income and retail business. arranged by region, state, city and metropolitan county area. October issue gives metro market projections and surveys for TV, newspaper and radio markets. Excellent source for selecting appropriate ad media.

3. CENSUS OF POPULATION
U.S. Bureau of Census publication conducted every 10 years ending in zero. Gives detailed characteristics of states, counties, cities and towns. Also gives statistical estimates of number of inhabitants, social and economic characteristics of the population. Summary volume and volumes for each state.

RECENT JOURNAL ARTICLES

1. BUSINESS PERIODICALS INDEX
2. PREDICASTS F & S INDEX
3. WALL STREET JOURNAL INDEX
4. CONFERENCE BOARD INDEX
5. PUBLIC AFFAIRS INFORMATION

NATIONAL BUSINESS ENVIRONMENT

1. CONFERENCE BOARD STATISTICAL BULLETIN (monthly)
   Periodical gives a general overview and forecast of key economic indicators and whether they are rising, level or declining. "Consumer Confidence and Buying Plans" and "Economic Forecasts" appear in each issue.

2. HANDBOOK OF BASIC ECONOMIC STATISTICS (monthly)
   Current and historical data for labor, industry, commerce and agriculture. Monthly figure and yearly totals. Prices, national product and income, profits and general business indicators. "Monthly Business Summary and Economic Highlights" section in each issue summarizes major economic indicators in the issue.

3. MARKETING ECONOMICS GUIDE: SECTION I. (annual)
   Data on current trends in the U.S. economy. Also complete marketing information by county, city and metro area distribution.

INDUSTRY INFORMATION

TRADE ASSOCIATIONS:

Trade associations are frequently the only source for detailed industry information. Many of them publish periodicals or annuals which describe the industry's activities. Many publications of trade associations are listed in the ENCYCLOPEDIA OF BUSINESS INFORMATION SOURCES (Ref HF 5353 .E52)

ENCYCLOPEDIA OF ASSOCIATIONS
(Ref HS 17 .G 334)
This directory includes information on associations in the U.S. It gives address, publications and offices for each group.

NATIONAL TRADE AND PROFESSIONAL ASSOCIATIONS DIRECTORY
(Ref HD 2425 .D53)
This is another source for information about trade associations.

CENSUS MATERIALS:

The Census of Manufactures
The Census of Wholesale Trade
The Census of Retail Trade
The Census of Selected Service Industries

The publications of the Department of Commerce and their updates are essential sources of industry data. U. S. industry is covered in minute detail in the censuses published every five years and in somewhat less detail in the annual surveys such as the ANNUAL SURVEY OF MANUFACTURES. Located in the Government Documents Section - 3rd Floor.

INDEXES:

BUSINESS PERIODICALS INDEX
(Index Table 5)
This index of the business periodical literature covers many articles on individual industries. It provides coverage of scholarly and general business periodicals.

ENCYCLOPEDIA OF BUSINESS INFORMATION SOURCES
(Ref HF 5353 .E52)
Lists sources such as industry association publications, including periodicals, directories and pamphlets.

OTHER REFERENCE SOURCES:

VALUE LINE INVESTMENT SERVICES
(ask at Reference Counter)
This service is arranged by industry and can supply basic background information. Its primary purpose is not industry information, however.

U. S. INDUSTRIAL OUTLOOK
(Ref HC 106.5 .A17)
This annual government publication includes basic background information, statistics and assessments of the prospects for U. S. industries. It does not provide information on individual corporations in an industry.

This guide compiled by:

Jamie L. Harris, Chicago State University Library, Reference Department

111780

I N V E S T M E N T S

INFORMATION SOURCES

Before investing, you need to have information on (1) the general economy, market conditions and outlook (2) the industries in which you want to invest and (3) the specific companies and securities which interest you.

This list of publications will give you most of the information you need to make more informed decisions. These materials are available in the Reference Department at Douglas Library.

I. BACKGROUND

For a basic understanding of financial reports and the stock market, read:

Vertical file	How to Read a Financial Report. New York: Merrill Lynch, Pierce, Fenner and Smith Inc., 1979.
Reserve	"How to read [stocks, etc]..." Chicago Tribune, March 4, 11, 18, 25 and April 1, 8, 1980.

II. CURRENT INVESTMENT NEWS

To keep abreast of the latest financial news and statistics, read:

Newspapers

Wall Street Journal (5 times per week)

Barrons (weekly)

New York Times (daily)

Chicago Tribune (daily)

III. STOCKS

Reference Desk — Value Line Investment Survey; Ratings and Reports; Selection and Opinion. 2 vols. New York: Bernhard & Co. Weekly updates.

Index Shelves — Moody's Manuals. New York: Moody's Investors Service. Annual. Semi-weekly supplements.

- Moody's Bank and Financial Manual
- Moody's Industrial Manual
- Moody's Municipal and Government Manual
- Moody's OTC Industrial Manual
- Moody's Public Utility Manual
- Moody's Transportation Manual

Index Shelves — Moody's Handbook of Common Stocks. New York: Moody's Investors Service. Quarterly.

Periodicals — Financial World; Business Week

IV. BONDS

Index Shelves — Moody's Bond Survey and Moody's Bond Record Monthly.

V. MUTUAL FUNDS AND INVESTMENT COMPANIES

Reference Desk — Wiesenberger Services, Inc. Investment Companies. New York: Wiesenberger Services. Annual.

Index Shelves — Moody's Bank and Finance Manual.

Ref HG 4930 .M85x — Investment Company Institute. Mutual Fund Fact Book. Washington: The Insitute. Annual.

V. MUTUAL FUNDS AND INVESTMENT COMPANIES (cont'd)

Periodicals — Financial World ("Independent Appraisals" section)

Barrons ("Quarterly Mutual Fund Record" in February, May, August and November issues)

Business Week (last issue: "Annual Investment Outlook")

Forbes (Annual "Mutual Fund Survey")

VI. DIVIDENDS

Index Shelves — Moody's Dividend Record. New York: Moody's Investors Service. Current issues cumulate annually.

Index Shelves — Moody's Handbook of Common Stocks.

Reference Desk — Value Line Investment Survey; Ratings and Reports.

VII. INDUSTRY INFORMATION

Reference Desk — Standard & Poor's Corp. Industry Surveys. The Corporation. Quarterly.

Ref HC 106.5 .A17 — U. S. Department of Commerce. Industry & Trade Assn. U.S. Industrial Outlook. Annual.

Reference Desk — Value Line Investment Survey

Periodical — Forbes (Jaunuary issue)

Newspaper — Wall Street Journal ("The Outlook" column in every Monday issue)

VIII. COMPANY INFORMATION

Information about a company is an important factor in determining whether or not you will invest in it. Ask a Reference Librarian for help in locating facts and statistics on a specific company.

This bibliography was compiled by:

Jamie L. Harris, Reference Librarian
October 1982

Douglas Library
Chicago State University

SPECIAL ISSUES
OF
BUSINESS JOURNALS

Title	Issue
Advertising Age Directory of top U.S. ad agencies. Gives profiles and ranking by income level.	March
Barrons Quarterly mutual fund record	February, May August, November
Black Enterprise Top 100 U.S. Black companies. Also covers Black-owned banks and insurance companies	June
Business Week Quarterly survey of corporate performance March issue covers previous year. Other issues cover preceding quarter. Lists top corporations in sales, earnings, growth, etc.	March, May, August, November
Bank scorecard. How the top 200 banks performed the previous year.	April, 4th issue
Annual survey of executive compensation	May, 2nd issue
Research and development scoreboard	June, 1st issue
Canadian Business Top 500 Canadian companies.	July
Crain's Chicago Business Many special issues covering Chicago business	
Datamation 100 leading manufacturers of data processing equipment	July

Title	Issue
Financial World	
Economy Forecast	January
Annual Report Award	November
Best Brokerage Firm	December
Chief Executive of the Year	March
Forbes	
Annual report on American industry. Measures performance of over 1,000 large U.S. companies. Arranged by industry	January, 1st issue
Forbes 500 ranks the nation's largest corporations	May, 1st issue
Mutual fund survey	August, 2d issue
Fortune	
Fortune 500. Largest industrial corporations ranked by sales.	April or May
Service 500	June, 2d issue
50 Leading U.S. Industrial Exporters	August
100 Largest Commercial Banks Outside U.S.	August
500 largest industrial corporations outside the U.S.	August
Sales and Marketing Management	
Survey of Buying Power	July, 2d issue
Survey of Buying Power, Part II	October, 2d issue

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All journals/periodicals listed are located in the Current Periodicals Room and the Bound Periodicals Area, 2nd Floor, Douglas Library.

For a list of more special issues, consult the following books:

Guide to Special Issues and Indexes of Periodicals Ref Z6951.S755

Management and Economics Journals: a Guide to Information Ref Z7164.07T23

J. L. Harris, Compiler
Reference Department